

eCivis Grants Network

Creating a Public Solicitation

User Guide

Contents:

- Step 1: Locate/Create a source of funds for the solicitation
- Step 2: Assign to a NEW project
- Step 3: Create the Public Solicitation
- Step 4: Publish the Solicitation

Step 1: Locate/Create a source of funds for the solicitation

The purpose of this first step is to locate or create the **source** of funding for the solicitation not the solicitation itself. For instance the source of funding could be a Federal grant where you are acting as the pass-through agency. Or it could be General Fund dollars from a special tax, etc.

NOTE: If the source of funds is a competitive Grant program follow instructions 1A. If the source of funds is a non-competitive grant program or non-grant funding, follow instruction 1B.

STEP 1A: Competitive grant program

- A. Select the *Research* button on the top left side of the home page and locate you grant using keywords or a CFDA number for Federal grants. **After locating your grant program, skip to Step 2.**

Organization Activity Summary [View Organization Dashboard »](#)

Open Projects	Applications Due	Applications Submitted	Funding Awarded	Post Award Reports Due
23	0	1	13	27

Search For Grants

Search by Keyword

See help popup for advanced search syntax. [?](#)

Search Agent [My Search Agents »](#)

Run an existing search agent. [?](#)

Existing Search Agents ▼

AND / OR

Additional Search Criteria [+ Open](#)

Find Grants Now! ➔

STEP 1B: Non-competitive grant program or non-grant funding

A. Click on the Grant Research Tab then Organization Funding.

The screenshot shows the eCIVIS dashboard. The top navigation bar includes 'Home', 'Grant Management', 'Grant Research', 'Insight', 'Reports', and 'Administration'. The 'Grant Research' menu is open, showing options like 'Search for Grants', 'My Search Agents', 'My Saved Grants', 'My Grant Review Tasks', 'My Recent Updates', 'New Grants/Updates', 'Search PFA Library', 'Organization Funding' (highlighted with a red box), and 'Allocation Sources'. On the left, there's a 'Research Find Grants' button and an 'Organization Activity Summary' table with columns: Open Projects (46), Applications Due (12), Applications Submitted (8), and Funding Awarded (14). On the right, there's an 'Insight Best Practices and More' button and a 'My Action Items' section with 'Tasks (Next 7 Days)' and 'Past Due Items'.

B. Click on Add Org Funding.

The screenshot shows the 'Organization Funding' page. The top navigation bar is the same as the previous screenshot. Below the navigation bar, there's a breadcrumb 'Home / Organization Funding' and a toolbar with icons for search, add, edit, print, and export. The main heading is 'Organization Funding'. Below it, a description states: 'This feature allows you to add, track, and manage funding opportunities that may not be in eCivis' database.' Below the description, there are two buttons: 'Add Org Funding' (highlighted with a red box) and 'Show Archived Org Funding'. Below these buttons is a 'Public Organization Funding' section with a 'List View' dropdown set to 'All Funding Sources' and a 'Minimize' button. Below this is a table with columns: GN Code, Funding Title, Fiscal Year, Funding Type, Total Funds, App Due, and Actions. The table shows 10 records per page, with a search bar and pagination controls (Previous, 1, 2, Next).

C. Select Competitive or Non-Competitive.

The screenshot shows the 'Add Organization Funding' page. The top navigation bar is the same as the previous screenshots. Below the navigation bar, there's a breadcrumb 'Home / Grant Management / Grant Research / Add Organization Funding'. The main heading is 'Add Organization Funding'. Below it is a 'Select Funding Process' section with two radio buttons: 'Competitive Funding' (selected) and 'Non-Competitive Funding'.

D. Complete the fields with asterisks.


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Add Organization Funding

Select Funding Process

☒ Competitive Funding
 ☐ Non-Competitive Funding

Funding Identification

Funding Title *:

Fiscal Year *:

Funding Type *:

☐ Formula

Grantor *:

FAIN:

Federal FON:

CFDA Number:

Organization ID:

Grant Contact:

Application/Financial

Due Date Type *:

Total Funds *:

Matching Required *:

Match Type *:

E. Add a Summary, select the appropriate Categories and Eligibility, and Save.

Summary

Give a brief overview of the activities supported by the funding opportunity as described in the funding announcement.

Summary

Categories

- | | | |
|---|---|---|
| <input type="checkbox"/> Agriculture | <input type="checkbox"/> Health, Prevention/Treatment | <input type="checkbox"/> Rural Issues |
| <input type="checkbox"/> Animal Welfare | <input type="checkbox"/> Health, Research | <input type="checkbox"/> Science/Technology |
| <input type="checkbox"/> Arts & Culture | <input checked="" type="checkbox"/> Housing | <input type="checkbox"/> Senior Citizens |
| <input type="checkbox"/> Community Development | <input type="checkbox"/> Human Services | <input type="checkbox"/> Social Justice |
| <input type="checkbox"/> Disaster Preparedness | <input type="checkbox"/> IT/Telecommunications | <input type="checkbox"/> Solid Waste |
| <input type="checkbox"/> Domestic Prep./Homeland Security | <input type="checkbox"/> Justice, Prevention/Correction/Rehab | <input type="checkbox"/> Tourism and Hospitality |
| <input type="checkbox"/> Economic Development | <input type="checkbox"/> Justice, Victims | <input type="checkbox"/> Training & Vocational Services |
| <input type="checkbox"/> Education | <input type="checkbox"/> Justice, Youth | <input type="checkbox"/> Transportation |
| <input type="checkbox"/> Energy | <input type="checkbox"/> Law Enforcement | <input type="checkbox"/> Wastewater |
| <input type="checkbox"/> Environment/Natural Resources | <input type="checkbox"/> Libraries | <input type="checkbox"/> Water Supply/Quality |
| <input type="checkbox"/> Fire/EMS | <input type="checkbox"/> Parks & Recreation | |
| <input type="checkbox"/> Hazardous Waste/Brownfields | <input type="checkbox"/> Recycling & Reuse | |

Help

Eligibility

- | | | |
|--|---|--|
| <input checked="" type="checkbox"/> Local Government | <input type="checkbox"/> Non Profits | <input type="checkbox"/> State Government |
| <input type="checkbox"/> Academic Institutions | <input type="checkbox"/> Other | <input type="checkbox"/> Tribal Organizations/Institutions |
| <input type="checkbox"/> Consortia | <input type="checkbox"/> Private Sector | |
| <input type="checkbox"/> Native American Tribe | <input type="checkbox"/> Schools/School Districts | |

Attachments

Reference URL:

Enter the granting agency's website for future reference. For example, http://...

Attach Files:

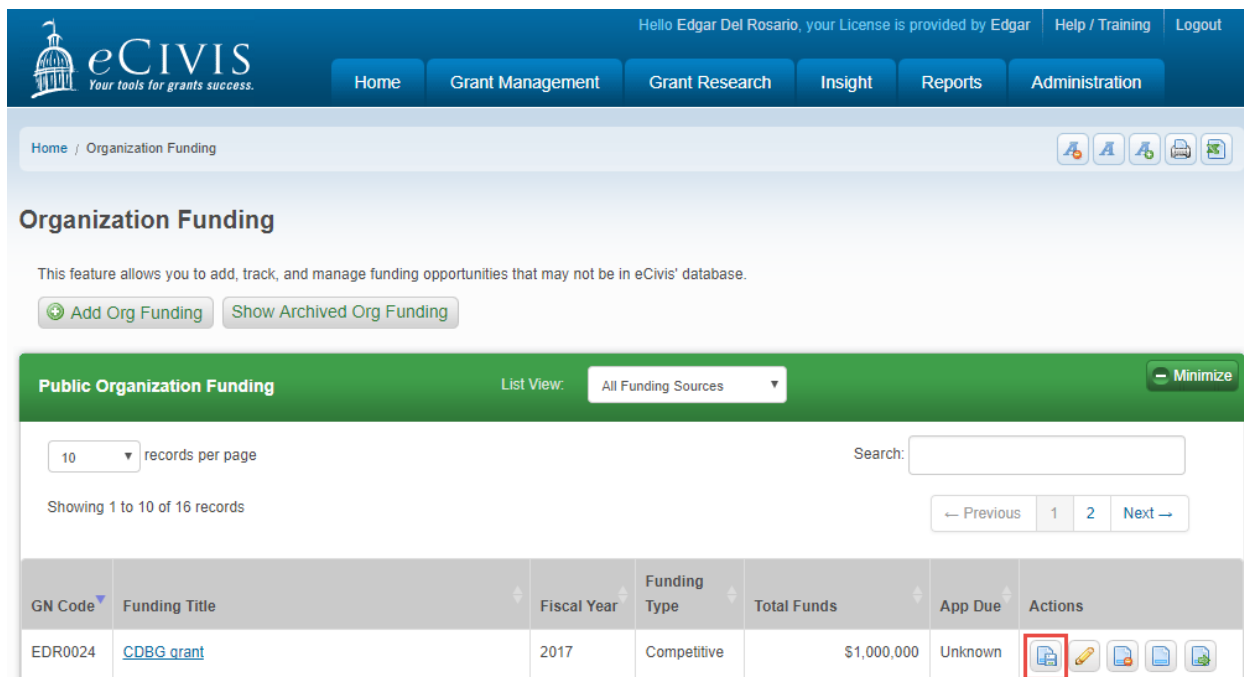


Save

Cancel

Step 2: Assign to a NEW project

A. Click on the Floppy Disk icon



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[Home](#) / [Organization Funding](#)

Organization Funding






This feature allows you to add, track, and manage funding opportunities that may not be in eCIVIS' database.

[Add Org Funding](#) [Show Archived Org Funding](#)

Public Organization Funding List View: [All Funding Sources](#) [Minimize](#)

10 records per page Search:

Showing 1 to 10 of 16 records [Previous](#) 1 2 [Next](#)

GN Code	Funding Title	Fiscal Year	Funding Type	Total Funds	App Due	Actions
EDR0024	CDBG grant	2017	Competitive	\$1,000,000	Unknown	    

B. Select Assign grant to a new project.

Save/Assign Grant

Grant: EDR0024 CDBG grant

☐ Assign grant to an existing project
☒ Assign grant to a new project
☐ Save as unassigned

[Cancel](#) 

C. Complete the fields with asterisks.

Assign Grant to New Project

1. Select Department & Project

Grant:

ORG0022 Prop. 47

Department *

Housing

Project *

CDBG Program - 2017

Project Lead *

Scott Williams

Project Type *

☒ Non-Construction ☐ Construction

Internal Project ID:

Internal Project Name:

Project Summary *

Summary

D. Select No and Grant Awarded.

2. Select Funding Status

Is an application required for this grant? *

☐ Yes ☒ No

3. Select Grant Status

Grant Status *

Grant Awarded

E. Complete the fields with asterisks.

Assign Grant to New Project

4. Complete Status Form


Projected Award \$*: 1,000,000.00

Is award amount known? ☒ Yes ☐ No

Internal Grant ID:

Internal Grant Name:

Do you consider this a competitive grant?*: ☒ Yes ☐ No

Award Notification*: 12/20/2017 

Awarded \$*: 1,000,000.00

F. If there's a Match Required, enter the amounts.

Assign Grant to New Project

Match Required: Yes

Match Type*: Cash/In-Kind ▼


Cash Match \$*: 100,000.00

In-Kind Value*: 100,000.00


G. Complete the following fields as necessary

Assign Grant to New Project


Contract Start Date:



Contract Close Date:



Reminder:




Award Type:

☐ Advance Payment ☐ Reimbursement

DUNS Number:

Grantor Contract Number:

 Notes:

500 Characters Left


H. Select No and click the Folders icon to attach a file associated to the grant (if needed)


5. Allocation Options

Are awarded funds to be available for Allocation to sub-projects? *

☒ No ☐ Yes

Upload Files

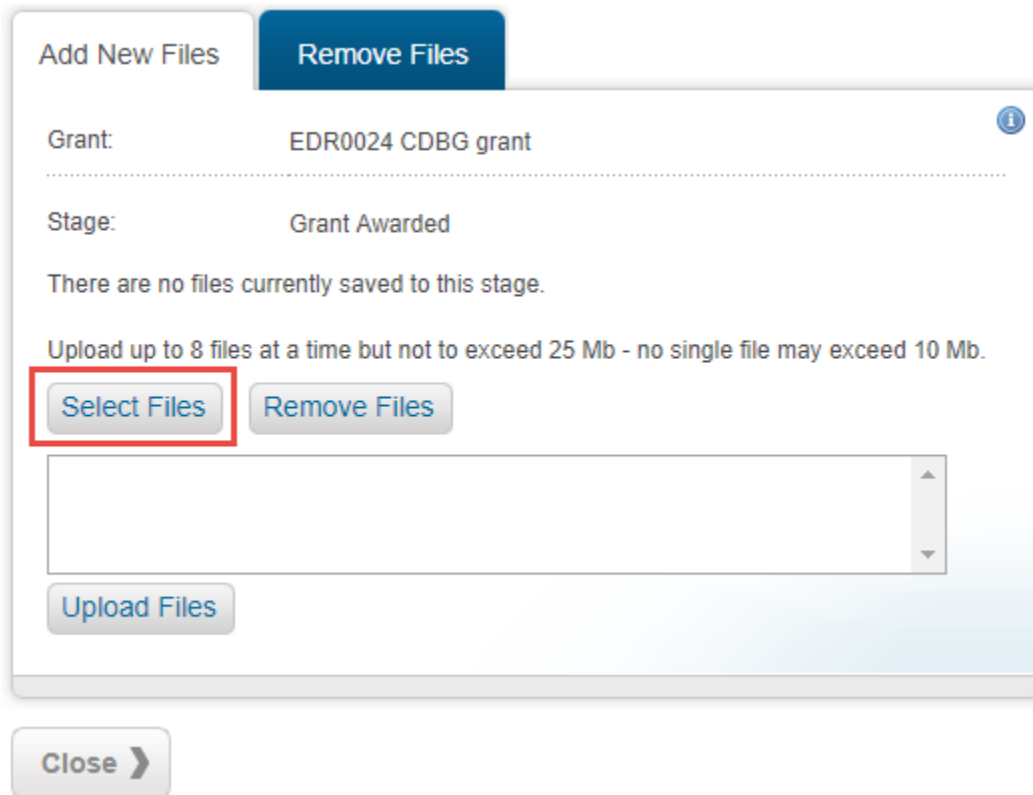
 Attach Files:



Save >

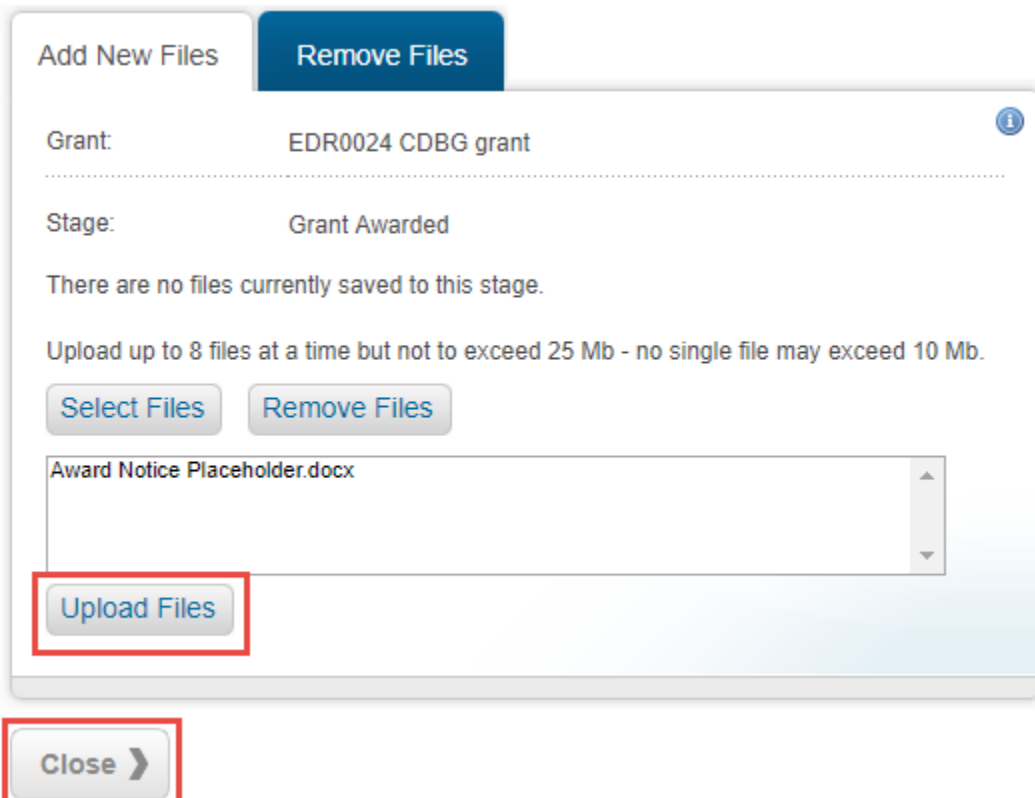
Cancel >

- I. Click Select Files to upload any application files (not required)



The screenshot shows a dialog box titled 'Add New Files' with a 'Remove Files' button. It displays 'Grant: EDR0024 CDBG grant' and 'Stage: Grant Awarded'. A message states 'There are no files currently saved to this stage.' and another message says 'Upload up to 8 files at a time but not to exceed 25 Mb - no single file may exceed 10 Mb.' Below these messages are two buttons: 'Select Files' (highlighted with a red rectangle) and 'Remove Files'. A file list area is empty, and an 'Upload Files' button is at the bottom. A 'Close' button with a right arrow is located below the dialog box.


- J. Find the file(s) to upload, click on Upload Files, and then Close



This screenshot shows the same dialog box as before, but now it contains a file named 'Award Notice Placeholder.docx' in the file list. The 'Upload Files' button (highlighted with a red rectangle) is at the bottom of the dialog box. Below the dialog box, the 'Close' button (also highlighted with a red rectangle) is visible.

K. Click on Save

Upload Files


Attach Files: 

Award Notice Placeholder.docx (10.9 Kb)

Save >
Cancel >

Step 3: Create the Public Solicitation

A. Click on the funding source you established


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Home Grant Management Grant Research Insight Reports Administration

Home / Organization Funding

Organization Funding

This feature allows you to add, track, and manage funding opportunities that may not be in eCivis' database.






Add Org Funding
Show Archived Org Funding

Public Organization Funding
List View: All Funding Sources v
Minimize


10 records per page
Search:

Showing 1 to 10 of 16 records

← Previous
1
2
Next →

GN Code	Funding Title	Fiscal Year	Funding Type	Total Funds	App Due	Actions
EDR0024	CDBG grant	2017	Competitive	\$1,000,000	Unknown	    

B. Click on Grant Usage.


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Home Grant Management Grant Research Insight Reports Administration

Home / Organization Funding / Grant Details

EDR0024 CDBG grant

Save / Assign
Email Grant
Grant Usage

Summary
Eligibility/Application
Financial
Contact/Files

Type:	Federal	Next Due:	Unknown
Agency:	HUD	Match Required:	Yes
		Actual Funds:	\$1,000,000

C. Click on the Project you created for the grant.

Grant Usage x

My Saved Grants

This grant is included in your [My Saved Grants](#).

Projects

This grant is attached to CDBG Program - 2017 in Housing.

Allocation Funding Source

This grant is not related to an allocation source.

Close >

D. Select I would like to create/manage a program for solicitation for this grant.

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Project Dashboard: Project for the CDBG grant Project Options

Overview

Documents

Grant Lifecycle

Goals & Metrics

Budgets

Contracts & Accounts

Spending

History

Active Grants

[EDR0024: FY2017](#) Stage: Grant Awarded Awarded: \$1,000,000.00 Match: \$200,000.00

[EDR0024 CDBG grant](#)

Project Team

[E. del Rosario](#) (Lead) City Manager

Available Actions

- ☐ I would like to request an account setup
- ☐ I am ready to schedule my report
- ☐ This grant does not require a report
- ☐ I am ready to close this grant
- ☐ I would like to view/manage my contract & account details
- ☐ I would like to create/manage goals and metrics for this grant
- ☐ I would like to create/manage a budget for this grant
- ☐ I would like to create/manage a program for solicitation for this grant

E. Enter the title of the Public Solicitation, select Public or Private, and then Save

Program Setup

x

Title:

Public Solicitation

Listing:

☒ Public
 ☐ Private

Save >

Cancel >

Program Setup Tip:
 The information provided here assists applicants who are seeking out funding assistance. This information will be visible publicly if the "Public" radio button is checked.

F. Click on the Pencil icon.

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Programs

Public Solicitations Listing Page

Draft

Minimize

Showing 1 to 1 of 1 entries

[← Previous](#)
1
[Next →](#)

#	Title	Project / Funding Source	Actions
1	Public Solicitation	Project for the CDBG grant EDR0024 - CDBG grant	

- G. Under the Overview tab, complete the fields with asterisks and the others as necessary. A summary is required. Click Save, then the Eligibility tab.

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Home / Organization Programs / Solicitation Edit

Solicitation Edit

Overview ✖ | **Eligibility ✖** | Financial ✖ | Contact ✖ | Files ✖ | Review ✖ | Submission ✖

✖ = Incomplete ✔ = Completed

Step 1 of 5 * = Required for Section Completion

Title: * ⓘ

Application Start Date: ⓘ

Application End Date: ⓘ

ID:

CFDA:

Reference URL:

Summary: *

Source | | | | **B** | *I* | U | | | | | | | | | |

Summary

body p

ⓘ Use the tabs to complete the solicitation. Make sure to click Save when making changes.

Save > | Done >

H. Under the Eligibility tab, complete the fields with asterisks. A summary is required. Click Save, then the Financial tab.

Home / Organization Programs / Solicitation Edit

Solicitation Edit

Overview Eligibility **Financial** Contact Files Review Submission

= Incomplete = Completed

Step 2 of 5 * = Required for Section Completion

Eligible Applicants: *

- ☒ Local Government
- ☐ Academic Institutions
- ☐ Consortia
- ☐ Native American Tribe
- ☐ Non Profits
- ☐ Other
- ☐ Private Sector
- ☐ Schools/School Districts
- ☐ State Government

Eligibility Notes: *


Summary

body p

Use the tabs to complete the solicitation. Make sure to click Save when making changes.

Save Done

- I. Under the Financial tab, complete the fields with asterisks and the others as necessary. A summary is required. Click Save, then the Contact tab.


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Solicitation Edit

[Overview](#) ✓
 [Eligibility](#) ✓
 [Financial](#) ✗
 [Contact](#) ✗
 [Files](#) ✗
 [Review](#) ✗
 [Submission](#) ✗
 ✗ = Incomplete ✓ = Completed

Step 3 of 5 * = Required for Section Completion

Funds Available: (min) (max)

Award Amount: (min) (max)

Number of Awards:

Average Award Size:

Matching Required?:*
 ☒ Yes
 ☐ No
 ☐ Recommended

Matching Type:*

Financial Notes:*

Summary

body p

Use the tabs to complete the solicitation. Make sure to click Save when making changes.

- J. Under the Contact tab, complete the fields with asterisks and the others as necessary. A summary is required. Click Save, then the Files tab.

Home / Organization Programs / Solicitation Edit

Solicitation Edit

Overview ☒ Eligibility ☒ Financial ☒ Contact ☒ **Files ☒** Review ☒ Submission ☒ ✗ = Incomplete ✓ = Completed

Agency/Department: CDBG

Office:

Program Contact*:

☐ Program Contact & Application Address are the same.

Application Address*:

Step 4 of 5 * = Required for Section Completion

Contact Notes: *

body p

Use the tabs to complete the solicitation. Make sure to click Save when making changes.

Save Done

- K. Under the Files tab, click on Add File.

Home / Organization Programs / Solicitation Edit

Solicitation Edit

Overview ☒ Eligibility ☒ Financial ☒ Contact ☒ **Files ☒** Review ☒ Submission ☒ ✗ = Incomplete ✓ = Completed

Current Files

No data available in table

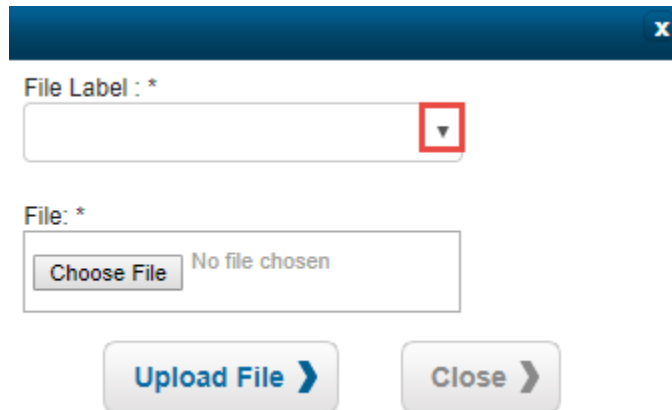
Add File

Application Submission Notes:

File Notes: *

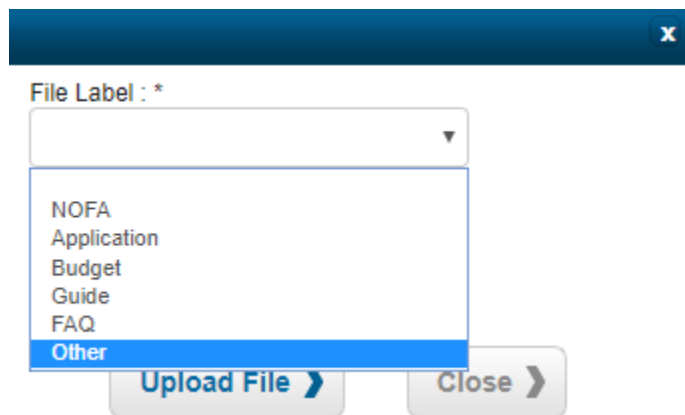
Step 5 of 5 * = Required for Section Completion

L. Click on the Dropdown arrow.



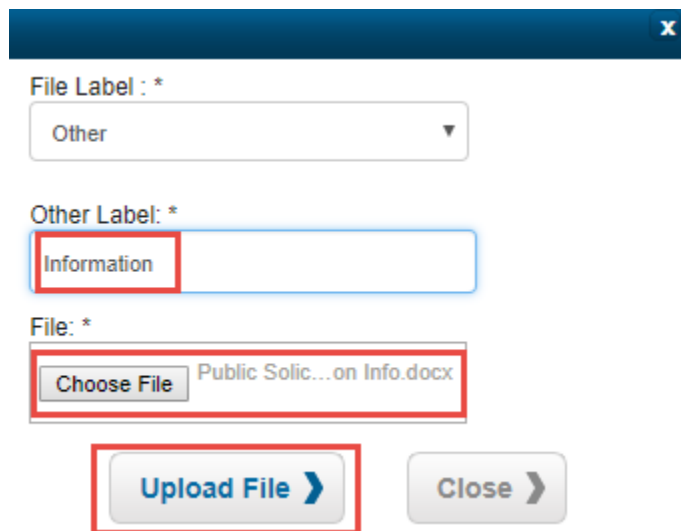
A screenshot of a web form for uploading a file. At the top is a dark blue header bar with a white 'x' icon in the top right corner. Below the header, the text 'File Label : *' is followed by a text input field. A red square highlights a small downward-pointing triangle (dropdown arrow) at the right end of this input field. Below this, the text 'File: *' is followed by a file selection area containing a 'Choose File' button and the text 'No file chosen'. At the bottom of the form are two buttons: 'Upload File' with a right-pointing arrow and 'Close' with a right-pointing arrow.

M. Select the type of file to upload.




A screenshot of the same file upload form, but the dropdown menu for 'File Label' is now open. The menu lists several options: 'NOFA', 'Application', 'Budget', 'Guide', 'FAQ', and 'Other'. The 'Other' option is highlighted with a blue background. The 'Upload File' and 'Close' buttons remain at the bottom.

N. Add other info as necessary. Choose the file to upload and click on Upload File.



A screenshot of the file upload form with all fields filled. The 'File Label' dropdown now shows 'Other' selected. Below it, the 'Other Label: *' text is followed by an input field containing the word 'Information', which is highlighted with a red rectangle. The 'File: *' section shows the 'Choose File' button and the filename 'Public Solic...on Info.docx', also highlighted with a red rectangle. At the bottom, the 'Upload File' button is highlighted with a red rectangle, while the 'Close' button is not.

O. Add Application notes as necessary. A summary is required. Click Save, then Done.










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Solicitation Edit









Overview Eligibility Financial Contact Files Review Submission 

Current Files

Information:  [Public Solicitation Info](#) (11.0 Kb) 

Add File 

Application Submission Notes:









Source     **B** **I** **U**    

Notes

body p


Step 5 of 5 * = Required for Section Completion



File Notes: *

Source     **B** **I** **U**    

Summary

body p

 Use the tabs to complete the solicitation. Make sure to click Save when making changes.

Save Done 

- P. Click on the Review tab. Enter the name of all individuals who will perform a review of submitted applications. By default, all reviewers will review all applications. Use the notes section to indicate any special instructions for the review process. For instance if reviewers should be randomly assigned to applications, or if reviewers are assigned to specific programs areas.

Solicitation Edit

Overview Eligibility Financial Contact Files Review Submission ✖ = Incomplete ✔ = Completed

Please enter review committee members:

Review Committee

Ryan Baird rbaird@ecivis.com

Add Reviewer

Step 6 of 7 * = Required for Section Completion

Review notes may be used to provide instructions to your customer service representative that will help them in designing the application and submission process for your solicitation. Once you have marked your solicitation complete, your customer service representative will follow up within one business day to confirm your program details. These notes will not appear to applicants.

Source **B** *I* U

Use the tabs to complete the solicitation. Make sure to click Save when making changes.

- Q. Click on the "Submission" tab. Enter the email address for the Primary Workspace Owner who will administrate the application and review process. By default the application will include Applicant Profile, the Standard Arizona application and Standard Budget. Use the submission notes to indicate any special instructions regarding the application such as a file upload for letters of support or other required documents.

Solicitation Edit

Overview Eligibility Financial Contact Files Review Submission ✖ = Incomplete ✔ = Completed

The primary workspace email will receive an invitation to the administration workspace to manage the solicitation process. Additional emails may be added within the administration workspace.

Primary workspace email: *

Step 7 of 7 * = Required for Section Completion

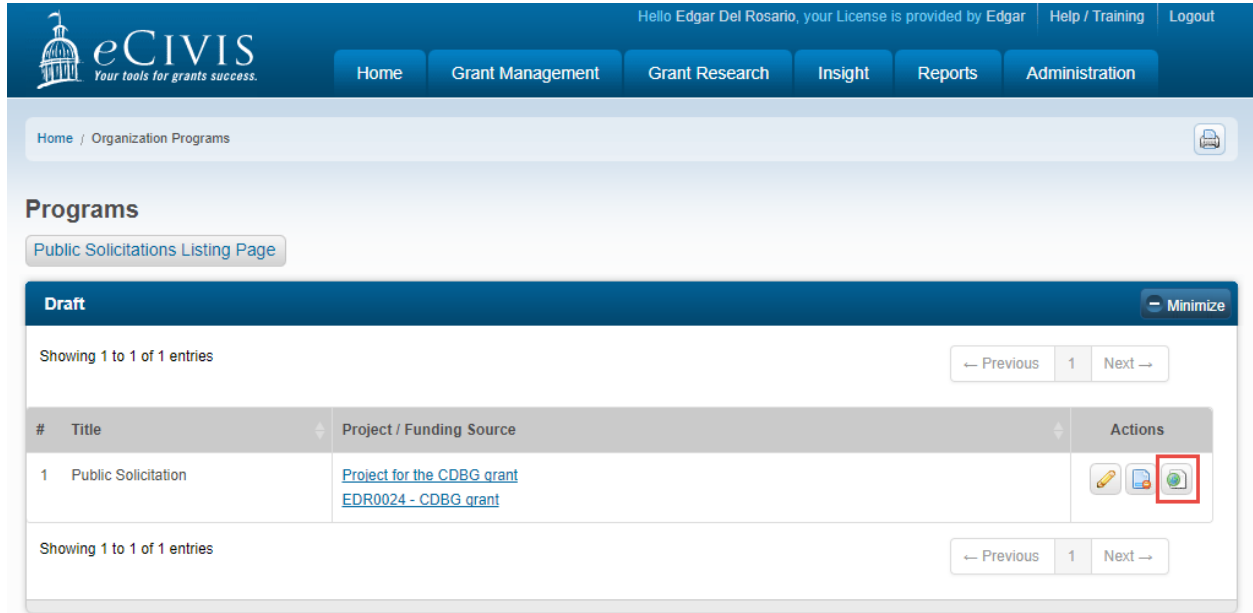
Submission notes may be used to provide instructions to your customer service representative that will help them in designing the application and submission process for your solicitation. Once you have marked your solicitation complete, your customer service representative will follow up within one business day to confirm your program details. These notes will not appear to applicants.

Source **B** *I* U

Use the tabs to complete the solicitation. Make sure to click Save when making changes.

Step 4: Publish the Solicitation

A. Click on the Globe icon.



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Draft Minimize

Showing 1 to 1 of 1 entries



#	Title	Project / Funding Source	Actions
1	Public Solicitation	Project for the CDBG grant EDR0024 - CDBG grant	  

Showing 1 to 1 of 1 entries

B. Click Yes.

Confirm x

Are you sure you want to publish 'Public Solicitation'?

Yes  **No** 


- C. The solicitation is Under Review. The Primary Workspace Owner will receive an email invitation to the applicant administration portal. Once the application and review process has been finalized notify eCivis at support@ecivis.com that you are ready for you solicitation to be published. In the email please include

Subject:

- Application/Review Complete for [name of program]

Body:

- Name
- Department
- Desired publish date

Under review Minimize			
Showing 1 to 1 of 1 entries		← Previous 1 Next →	
#	Title	Project / Funding Source	Actions
1	CDBG Program	Downtown Arts Program CFW0000 - Grant 1 - 2017	
Showing 1 to 1 of 1 entries		← Previous 1 Next →	